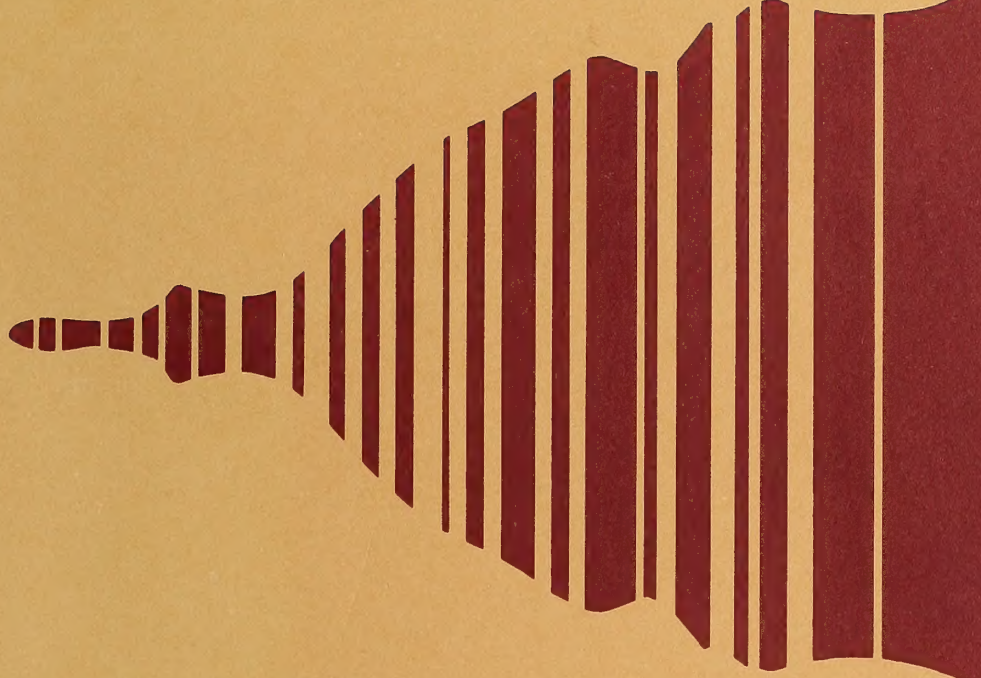


Legislative Notes V

An Index to the Legislative
History of Public Law 98-21,
Social Security Amendments of
1983 (Titles I-IV)



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PREFACE

The Social Security Amendments of 1983 represent a landmark in providing for the financial stability of the Social Security program. The purpose of the legislation was to shore up lagging public confidence that Social Security would be able to meet its future obligations by setting the program on sound financial footing for the coming decades.

As in earlier issues of Legislative Notes, provisions are included in the index whether or not they were included in the law as finally signed by the President.

CHANGES IN THE INDEX

We have continued the system of title abbreviations to identify hearings included in the legislative history. A finding guide that will enable the researcher to start with the Public Law section number and go directly to the topic or topics under which its legislative history has been indexed has been added.

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U.S. Congress. House. Committee on Ways and Means. Recommendations of the National Commission on Social Security Reform. 98-1 February 1-3, 1983. 256 p. RSR

U.S. Congress. House. Committee on Ways and Means. Tax Aspects of the President's Economic Program. 97-1 Feb. 24, 25; March 3, 4, 5, 25, 26, 27, 30, 31, and April 1, 2, 3, 7, 1981. Part 1, 581 p. TAP(1)

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U.S. Congress. House. Committee
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1900. H. Report 98-25 (Part 1)
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Benefit computation - quarters of coverage - increase the number needed to qualify for full benefits			<u>NCS (1)</u> 90 <u>NCS (2)</u> 339, 341, 346 <u>NCS (3)</u> 535			Boschwitz S3762 3/23/83

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Benefit computation - quarters of coverage - require 1 quarter of coverage for 1 quarter of work			NCS(2) <u>339, 342</u> NCS(3) <u>535</u>	98-25(Pt.1) 98-23	98-47	Boschwitz	S3762	3/23/83
Benefit computation - real rate of return		SFI <u>510, 537</u>				Rostenkowski Heinz Moynihan Gorton	H956 S3049 S3050 S3758	3/09/83 3/16/83 3/16/83 3/23/83
--general revenue financing for real rate of return plus inflation factor		FSS(2) <u>977</u> SFI <u>537</u>	SSO(2) <u>510, 517</u>					
Benefit computation - reduce initial benefit levels gradually by 5% over an 8 year period beginning in the year 2000				6, 66-68, 175 3, 7, 21		Taylor Rostenkowski Shannon Levitas St. Germain Conable Albosta Wirth Thomas of CA Collins Neal - Pepper amdt. strikes provision Pickle	H947 H956 H963 H975 H984 H997 H999 H1002 H1006 H1009-10 H1017 H1054 H1783	3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/24/83

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Benefit computation - replacement ratio (ratio of benefits to previous wages)		FSS(1) 206, 211, 331, 497 FSS(2) 516, 830, 872, 886, 1028 RSR 121, 140, 145-146	NCS(1) 118 NCS(2) 31, 33, 102, 118- 119, 154 NCS(3) 112, 408			Shannon Pepper Stokes Heinz - lower from 42% to 40% Moynihan Armstrong Glenn	H963 H1069 H1074 S3048- 49 S3050 S3052 S3771	3/09/83 3/09/83 3/09/83 3/16/83 3/16/83 3/16/83 3/23/83

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Benefit computation - replacement ratio - change formula vs. raising the retirement age - scenarios		FSS(1) 351-353				
Benefit computation - replacement ratio - disability		SFI 832				
Benefit computation - replacement ratio - limit for low income levels to no more than twice the replacement ratio for high income levels		FSS(1) 425, 428 SFI 922, 923	NCS(3) 455 SSO(1) 409			
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Benefit computation - replacement ratio - percentage needed to maintain pre-retire- ment standard of living		FSS(2) 830				

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Benefit computation - stratification		SFI 499, 501, 509					
Benefit computation - update contributions used in computations periodically to reflect price - level changes		SFI 502, 510, 539-541					
Benefit computation - wage - indexing the initial benefit		SFI 30, 35, 202, 654, 659, 748, 749					
Benefit computation - weighted benefit formula		SFI 112, 124, 127, 424, 510, 523, 635, 637, 662, 665, 812	SSO(1) 485 SSO(2) 299			Jacobs Kassebaum Abdnor	H971 3/09/83 S3719 3/23/83 S4099 3/24/83

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Benefit structure - slow growth of		SFI 116, 155				Rudd Paul Heinz	H978 3/09/83 H981 3/09/83 S3049 3/16/83
Benefits, based directly on contributions (simple annuity program) See also: Annuity Program - Replace Social Security with							
Benefits - delay because of lack of funds			SSO(1) 47-48				

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Benefits - make more proportional to taxes or tie to contributions (relationship of benefits to contributions)		FSS(1) 42, 44, 496 FSS(2) 554, 557, 936 RSR 58 SFI 116, 120, 424-425, 497, 500, 502, 509, 517, 523, 526, 538, 542	NCS(1) 70, 137, 156, 173-174 NCS(3) 343, 352 SSO(1) 95, 229, 254, 257, 259, 409, 508-509 SSO(2) 10, 17, 45			Carney Paul Reader's Digest Article Biaggi	H952 3/09/83 H980 3/09/83 H1009 3/09/83 H1010 3/09/83
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--slow growth of average real benefits			SSO(1) 75, 150- 151, 152			
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Cost-of-living benefit increases - limit to a certain percentage of the CPI		<u>FSS(1)</u> 44, 239, 254, 472 <u>FSS(2)</u> 708, 797-800, 999 <u>RSR</u> 129 <u>SFI</u> 8, 18-20, 151, 428, 431, 435, 446, 452, 454, 654, 659, 717, 909, 911, 913 <u>TAP(1)</u> 187	<u>AFB(1)</u> 437, 449-450, 522, 525 <u>NCS(2)</u> 24, 106, 124, 143, 341, 345 <u>NCS(3)</u> 82, 443, 448, 534, 535 <u>SRP(2)</u> 65, 69-70, 73, 92, 147 <u>SSO(1)</u> 373, 439-440, 442-443, 506			Senate Finance Committee financing options Reader's Digest article	S11374 10/14/81 H1009 3/09/83

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Cost-of-living benefit increases - limit to the CPI rate or 7%, whichever is lower		SFI 755, 757 SFI 471, 473						
--limit to the CPI rate or 5% whichever is lower								
Cost-of-living benefit increases - limit when inflation is 5% a year or more		SFI 28, 35, 39, 55, 59						
Cost-of-living benefit increases - make a matter of discretion based on economic and budget situation		TAP(1) 554, 557						

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Cost-of-living benefit increases - pro-rate to reflect month of retirement			NCS(2) 143 NCS(3) 13, 14, 28			Senate Finance Committee financing options Helms S11373 10/14/81 S3263 3/17/83
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Cost-of-living benefit increases-reasons for			AFB(1) 426			
Cost-of-living benefit increases - reduce for a 4 year period but continue full COLA for lowest 25% of social security recipients			NCS(3) 534, 535			
Cost-of-living benefit increases - reduce for all entitlement programs			NCS(2) 299, 302, 303, 310-311			

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Cost-of-living benefit increases - reduce when trust fund reserves are projected to be less than 20% of outgo and falling unless Congress responds by providing additional financing - "fail-safe" provision	143	FSS(1) 121, 122, 124, 237, 241, 252- 254, 423 FSS(2) 536, 578, 708, 715, 734	NCS(1) 168 NCS(2) 316 NCS(3) 65, 70-71, 86, 555, 645	8, 24-25, 75	133-134	Senate Finance Committee financing options Dole Cost estimate Comparison with present law Heinz Armstrong "An Imperfect Compromise" article Long Symms Grassley Humphrey Bradley	S11373 10/14/81 S3023 3/16/83 S3042 3/16/83 S3270 3/17/83 S4084 3/24/83 S4087 3/24/83 S4094 3/24/83 S3029 3/16/83 S3034 3/16/83 S3048 3/16/83 S3052 3/16/83 S3610 3/22/83 S4091-4092 3/24/83 S3055 3/16/83 S3055 3/16/83 S4085 3/24/83 S3057 3/16/83 S3062 3/16/83 S4098 3/24/83 S3623 3/22/83 S3757 3/23/83

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--fail-safe - automatic incre- ases in tax rates and automatic reductions in COLA's when there are shortages in the trust funds		RSR 35	NCS(3) 389, 400, 406, 645- 646					
--fail-safe - mechanism, unspecified		RSR 4-5, 9, 16, 24, 26, 27, 34, 35, 44, 62, 77, 78, 81, 94, 205, 249	NCS(1) 12, 13, 18, 23, 67, 69, 75, 89, 100, 145 NCS(3) 65-66, 70- 71, 77, 195, 317, 389, 399-400, 402,					

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Currently insured benefit - discontinue		<u>FSS(2)</u> 851					

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--privacy and Freedom of Information Act issues		STI 69-70					
Death record, State matches		STI 68-70					
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--fertility trends		FSS(1) 426 FSS(2) 506, 895	NCS(2) 221, 227 NCS(3) 264, 565 SS0(1) 66, 69-71, 114-117					

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Dependency ratio - declining ratio of children to those at work (total dependency ratio)			NCS(3) <u>57</u> SSO(1) <u>286, 315-</u> 316 SSO(2) <u>107</u> SSR <u>98</u>				
Dependency ratio - federal employee/ retiree ratio		FSS(2) <u>608</u>					
Dependency ratio - ratio of workers to dependents		FSS(1) <u>123, 229,</u> 451, 487 FSS(2) <u>506, 510,</u> 515, 548, 608, 832,	NCS(1) <u>16, 46</u> NCS(2) <u>82, 90,</u> 101, 126			Rudd Johnson Coleman of MO Pickle Campbell Porter Matsui Stark	H978 3/09/83 H989 3/09/83 H992 3/09/83 H1047 3/09/83 H1050 3/09/83 H1053 3/09/83 H1055 3/09/83 H1056 3/09/83

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Derivative benefits, phase out			SSO(2) 45			Senate Finance Committee financing options	S11376 10/14/81
Disabled surviving spouses and divorced surviving spouses, aged 50 to 59 who re- marry - benefits for See: Remarriage - continue benefits for							

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Disabled surviving spouses - make eligible for benefits at any age with no reduction		<u>SFI</u> 66, 94-96, 306				
Disabled widows and widowers aged 50 to 59 at disablement - benefit rate-make the same as for nondisabled widows and widowers first claiming benefits at age 60 See also: Widowed persons, disabled - increase benefits for	134	<u>FSS(1)</u> 53, 103, 477, 481, 484 <u>FSS(2)</u> 570, 616, 618, 620, 634-635, 637, 640, 643, 715, 862, 993, 1005 <u>RSR</u> 18, 19, 122, 129, 169, 172	<u>NCS(1)</u> 28, 30-31, 38-39, 121, 130-131 <u>NCS(2)</u> 122, 260, 265, 267, 273-274, 592-593, 600, 609, 625, 637, 652-653 <u>NCS(3)</u> 16, 42, 136, 196, 311, 404- 405, 639, 748	5, 35, 60-61, 161, 165, 170, 172, 175 2, 3, 6, 19, 73-74	130-131	Johnson H989 3/09/83 Shumway H1000 3/09/83 Cost estimate S3029 3/16/83 Comparison with present law S3033 3/16/83 Helms S3263 3/17/83
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Disability program - benefit formula - remove dependents benefits from		<u>SFI</u> 816	<u>SSO(1)</u> 457				
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Disability program - increase the number of required quarters in covered employment to 30 out of 40 quarters			<u>NCS(3)</u> 536			Boschwitz	S3762 3/23/83
Disability program - remove from social security		<u>FSS(2)</u> 792, 859	<u>NCS(3)</u> 60-61				
Disability program - remove from social security and pay benefits at basic needs level		<u>FSS(2)</u> 774, 775					

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Disability program - special liberalized benefit for those for whom continued work is impossible or is a hardship		FSS(1) <u>197</u>	NCS(1) <u>415</u>	98-25(Pt.1) 98-23	98-47		
		FSS(2) 617, 635, 637, 755, 886	NCS(2) 42, 44, 98, 630				
		RSR 7, 47-48, 84-85, 91, 164	NCS(3) <u>309, 792</u>				
			SSO(1) <u>95</u>				
			SSO(2) <u>30-31</u>				
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Disability - relaxation of insured status requirements for certain workers previously entitled to a period of disability before age 31	332	STI <u>63, 68</u>		81-82, 101	152		
Divorced husbands - benefits for See also: Sex equality	301	STI <u>61</u>		71, 88-90	140		

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Earnings base - eliminate ceiling on and make all earnings subject to payroll tax		FSS(1) <u>67, 223,</u> 225 FSS(2) <u>727, 728</u> RSR <u>76</u> SFI <u>9, 14-15, 23,</u> 24, 152-153, 450, 934 TAP(1) <u>554</u>	NCS(3) <u>637</u>			Senate Finance Committee financing options Gejdenson S11375 10/14/81 H1000 3/09/83

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Earnings base - freeze at January 1980 level		FSS(2) 875					
Earnings base - increase beyond levels in current law		SFI 1010					
Earnings base - increase rather than increasing payroll tax		FSS(1) 67, 71-72, 73, 129	NCS(1) 141 NCS(2) 144-145				

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Earnings base - increase to 99% of covered earnings			NCS(3) 691				
Earnings base - increase to \$75,000 by 1988		FSS(1) 476, 477, 481, 485					
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Earnings base - tax total compensation package including fringe benefits (employer's share) and accompany by a payroll tax reduction			NCS(1) 140-141				
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Families - one worker and two worker - inequities between		FSS(1) <u>247</u> , 252 FSS(2) <u>616</u> , 638, 651 RSR <u>18</u> , 32, 36, 167	NCS(1) <u>30</u> , 34 NCS(2) <u>275</u> , 591, 597, 624 NCS(3) <u>196</u> SSO(1) <u>511</u>			Cranston Jepsen	S3046 3/16/83 S3761 3/23/83

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Individual retirement accounts (IRA's) - allow contributions to be deducted from payroll taxes with social security benefits reduced to the extent that advantage was taken of the IRA		FSS(1) 473	NCS(2) 90-91, 233 NCS(3) 27, 662-663				

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Retirement test - raise to age 75			<u>NCS(3)</u> 534, 535				
Retirement test - re-examine periodically		<u>FSS(2)</u> 923	<u>NCS(3)</u> 547				
Retirement test - reform - unearned income		<u>FSS(1)</u> 66, 68-70, 73 <u>FSS(2)</u> 862, 1023	<u>NCS(2)</u> 499 <u>SSO(2)</u> 272				
Retirement test - retain exempt age 72 limit permanently			<u>SSO(1)</u> 420			Senate Finance Committee financing options	S11375 10/14/81
Retirement test - retain for persons under 65			<u>NCS(2)</u> 42, 44-45				

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Rowan Companies, Inc. v. United States See: Compens- ation - meals and lodging							
Savings bond, social security		<u>FSS(1)</u> 3-9, 172, 174, 212, 214 <u>FSS(2)</u> 524, 527-528 748, 785, 810-812 <u>RSR</u> 44, 133-134	<u>NCS(1)</u> 23, 136 <u>NCS(2)</u> 288-297 <u>NCS(3)</u> 195, 333- 334, 658				
Savings, personal - incentives to/ encourage to supple- ment social security See also: Family Security Program		<u>FSS(1)</u> 107 <u>FSS(2)</u> 916, 918, 1033 <u>SFI</u> 412, 453, 455, 753	<u>NCS(2)</u> 90-91, 499 <u>SSO(1)</u> 94, 230, 421			Symms	S3058 3/16/83

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Savings, personal - phase out social security in favor of an investment - type program for everyone under age 50		SFI 944-947, 953					
Savings, personal - savings accounts as an alternative to social security		FSS(1) 464-466 FSS(2) 781-786, 793, 810-816, 824, 840-846, 1012, 1033 RSR 146-147	NCS(2) 231-235, 499 NCS(3) 2, 7-11, 27, 28, 330-353, 445, 523- 529, 588, 660-664 SSO(2) 57, 312- 313, 316				
Savings, personal - social security discourages		SFI 253, 285	NCS(2) 90 SSO(1) 256				
Savings, personal - use social security as a base		FSS(2) 846	SSO(1) 310-311, 408				

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Self-employment income - crediting of income of employees of spouses		<u>STI</u> 67					
Sex equality - changes with regard to	301-307	<u>SFI</u> 914, 917-918				Johnson Shumway	H989 3/09/83 H1000 3/09/83
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Social Security Administration - administrative prob- lems including computers, fraud, reorganizations		<u>FSS(1)</u> 413, 414-415 <u>FSS(2)</u> 769, 850 <u>RSR</u> 247-249, 252 <u>SFI</u> 53-54, 62- 64, 157-169, 225-229, 237, 248, 251, 252, 258, 466-467 <u>STI</u> 70	<u>NCS(2)</u> 428 <u>SSO(2)</u> 259-260			Heinz - failure to revise and update computer system, separate administration of medicare and cash benefit programs, errors in checks and earnings records	S3372 3/18/83
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Social Security, cost as a percentage of taxable payroll		FSS(1) 453-454 RSR 56	NCS(1) 16 SRP(2) 36				

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Social Security option account (SSOA) - allow individuals to contribute up to 20% of the social security earnings base into a personalized SSOA; for every \$1000 contributed one-half percent of future social security benefits would be forfeited				161		Symms S3058 3/16/83 S3341- 3343 3/18/83 Dole S3343 3/18/83 Symms amdt. directing the Treasury to study the concept of the SSOA - S3343- 3344 3/18/83 Symms S3343- 3344 3/18/83 Dole S3344 3/18/83

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<p>Social security option account (SSOA) - allow individuals... (cont.)</p> <p>See also: Individual social security account for every person</p> <p>Pensions, private - option of purchasing in lieu of participating in social security system</p>						
<p>Social Security - partial for those who work part time between ages 65 and 70</p>		<p>SFI 489, 492</p>				
<p>Social Security phase out system by the year 2010</p>		<p>FSS(2) 1011</p>				
<p>Social Security program - secret plan to destroy</p>		<p>RSR 50, 120</p>				

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SSI - benefit increase - to offset cost-of-living benefit increase 6 month delay - \$20 a month for individuals, \$30 for couples	401	FSS(2) 935 PSR 15, 165	NCS(2) 403 NCS(3) 797	2, 7, 106, 107, 109-112, 170, 176 10, 45, 69, 75, 78	164-165	Pepper Rostenkowski Frenzel Pickle Ford of TENN Johnson Fowler Gunderson Conable Wirth Kastenmeier Biaggi Kaptur Dole Cost estimate Comparison with present law Percy Leahy	H946-947 3/09/83 H1069 3/09/83 H956 3/09/83 H1780 3/24/83 H957 3/09/83 H961 3/09/83 H964 3/09/83 H989 3/09/83 H994 3/09/83 H995 3/09/83 H997 3/09/83 H1781 3/24/83 H1002 3/09/83 H1004 3/09/83 H1010 3/09/83 H1012 3/09/83 H1013 3/09/83 S3022 3/16/83 S3029 3/16/83 S3030 3/16/83 S3040 3/16/83 S3765 3/23/83 S4097 3/23/83

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SSI conversion project		<u>SFI</u> 225		98-25(Pt.1) 98-23			
SSI - Cost-of-living increases - delay 6 months	401	RSR 79-80, 161, 164, 188, 190, 192, 196-197, 225, 252-254	NCS(1) 5, 22	7, 106, 107, 109 10, 69, 78- 79	164-165	Pepper Ford of TENN Fowler Conable Ackerman Dole Rostenkowski Conable	H946 H964 H994 H997 H1014 S3022 H1780 H1781 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/16/83 3/24/83 3/24/83
SSI - Cost-of-living increases - freeze			NCS(2) 73, 77				
SSI - Cost-of-living increases - retain July 1983 COLA increase		FSS(1) 93, 96 RSR 15	NCS(2) 56, 64, 631, 639 NCS(3) 36				
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SSI - disability investigations		SFI 225, 239-240		98-25(Pt.1) 98-23	98-47		
SSI - general revenue financing for See: General Revenue financing for SSI							
SSI - income and resources		SFI 412				Cost estimates new beneficiaries as a result of increased income limits	S3029 3/16/83
SSI - income and resources - assets test - eliminate		FSS(1) 192	NCS(2) 25				
SSI - income disregard - \$30 increase		FSS(1) 54, 93, 96, 97, 113, 115, 119, 191, 195, 251 FSS(2) 568, 635, 864, 867, 887, 1001, 1030	NCS(1) 5, 22, 129-130, 144 NCS(2) 24-25, 73, 77, 608, 617, 638 NCS(3) 36, 41, 46- 47, 51, 193				

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SSI - income disregard - \$30 increase (cont.)		RSR 15, 23, 62, 80, 104, 128- 129, 161, 163, 188, 224, 252-254	438, 555, 731, 747, 791			
SSI - increase benefits to poverty level/and in the future to 125% of poverty level		FSS(1) 93, 96, 191- 192 FSS(2) 867 SFI 412	NCS(2) 25 NCS(3) 36-37, 438 SSO(2) 31, 46			
SSI - liberalize for those unable to find work		FSS(1) 44				
SSI - one-third reduction for persons living in the house- hold of another - eliminate		FSS(1) 192	NCS(2) 25			
SSI - periodic review project		SFI 225				

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SSI - prohibit states from lowering their benefits to offset the increase in Federal benefits - "pass through"	402			106, 107, 112-117 10, 45, 79	165-166 98-47	Biaggi Cost estimate Comparison with present law	H1012 3/09/83 S3030 3/16/83 S3040 3/16/83
SSI - provide a minimum standard of living for those qualifying for low pensions below established minimums		SFI 500, 511					
SSI - public emergency shelters - payment of SSI to temporary residents of	403			8, 106, 107, 117, 177 75	166		
SSI - special benefit for workers aged 62-65 with chronic health impairments			NCS(2) 42, 44, 98				
SSI - "state supplementation only" recipients				114-115			

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SSI - temporary residents of emergency public shelters - benefits for See: SSI and AFDC - income and resources - treatment of emergency and inkind assistance given by private nonprofit organizations						
SSI - 25% benefit increase for long time low wage earners		SFI 62				
SSI - unearned disregard - increase			NCS(2) 25			
SSI - welfare elements of social security program should be shifted to See also: Social Security system - welfare programs in		SFI 515, 517				

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SSI - welfare stigma		<u>FSS(1)</u> 55, 66, 69	<u>NCS(2)</u> 260, 264				
Student benefits - restore		<u>FSS(2)</u> 791					
Students - exempt full time students 17 years old and younger from social security withholding		<u>FSS(2)</u> 554, 557 <u>SFI</u> 912	<u>NCS(2)</u> 132 <u>SSO(1)</u> 444				
Supplemental program - social security as See: Social Security as a pension program or a supplemental program							
Supplemental retire- ment benefits		<u>FSS(1)</u> 129, 131					
Survivor benefits - continued indexing for deferred survivor benefits See: Widows - benefits for widows							

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whose husbands died before the widow became eligible for benefits				98-25(Pt.1) 98-23	98-47		
Survivor's benefits - extra premium or tax for		SFI 143-146, 543-544					
Survivor's benefits - phase out		SFI 188, 547					
Tax credit - allow a one time credit of 0.3% of wages against 1984 employee payroll (FICA) taxes	123	FSS(1) 76, 115, 128, 135, 172, 173, 195, 236, 239, 255, 442, 461 FSS(2) 522, 570, 708- 709, 714, 717, 719, 734, 749, 853, 859, 867, 922, 943, 951, 1001-1002 RSR 13, 23, 31, 35, 58, 82, 87, 100, 164, 181	NCS(1) 3, 5, 20, 32, 84, 121, 122 NCS(2) 7, 9, 82, 106, 107, 133, 142, 166, 323, 406, 417, 420-421, 425, 608- 609, 619, 639 NCS(3) 76, 81, 136, 291, 439, 546, 638, 658,	5, 31, 54, 8, 31, 73 166, 174	124	Rostenkowski Pickle Walker Archer Roybal Fowler Gunderson Conable Shumway Dole Cost estimate Comparison with present law Armstrong Baucus Melcher Hatch Percy Nickles	H956 H961 H1782 H972 H977 H989 H994 H995 H997 H999 S3022 S3609 S3029 S3036 S3608 S3690 S3739 S3760 S3765 S3769 3/09/83 3/09/83 3/24/83 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/16/83 3/22/83 3/16/83 3/16/83 3/22/83 3/23/83 3/23/83 3/23/83 3/23/83 3/23/83 3/23/83

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Tax credit - allow a one time credit of 0.3% of wages... (cont.) --Tax credit on second increase in FICA tax			748, 816, 864 NCS(2) <u>609, 640</u>		Summary of provisions Rostenkowski Long Lautenberg	S3770 3/23/83 H1780 3/24/83 S4086 3/24/83 S4102 3/24/83
Tax credit - allow employers/employees an income tax credit on their payroll tax contributions		FSS(2) <u>735, 787,</u> 789, 1002 ESS <u>50</u> FSS(1) <u>174, 212,</u> 214 FSS(2) <u>953, 1001-</u> 1002, 1018, 1031 IAS <u>15, 58, 60,</u> 94-95, 122, 126-127 RSR <u>124</u> SFI <u>9, 13, 272-</u> 273, 293, 328- 329, 406-407, 410, 427, 452, 536, 651, 657,	NCS(1) <u>123</u> NCS(2) <u>417, 420-</u> 421, 425 SS0(1) <u>280, 291-</u> 293, 354			

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Tax credit - allow employers/employees... (cont.) --tax credit to off- set social security tax for those who do not draw benefits because they don't need them		670, 704, 742, 753, 773-774, 1010 FSS(2) 1018		98-25(Pt.1) 98-23			
Tax credit - equal to 46% of employers contribution to universal pension system		SFI 411, 421					
Tax credit - equiv- alent to what social security benefits would be if an individual stopped working		SFI 251					
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Tax credit for small businesses for the increase in social security payroll taxes in 1984						Baucus amdt. adopted Quayle Dole Moynihan Sasser	S3689- 3692 3/23/83 S3691- 3692 3/23/83 S3692 3/23/83 S3692 3/23/83 S3692 3/23/83
Tax credit for the self-employed - SECA - to partially offset increases in payroll tax	124	FSS(1) 17, 128, 187, 195, 430, 432 FSS(2) 572-573, 582- 584, 592, 593, 613, 862, 864- 867, 1003	NCS(1) 20, 83 NCS(2) 129, 160- 163, 179, 252, 608, 618 NCS(3) 288, 430- 431, 439, 549, 590, 738, 741, 754-755	5, 32-33, 9, 32-33, 55-56, 166 73	125-126	Rostenkowski Pickle Walker Rudd Roybal Fowler Gunderson Albosta Shumway McDade Daschle Pepper Dole Cost estimate Comparison with present law Armstrong Boschwitz Heinz	H956 3/09/83 H1780 3/24/83 H961 3/09/83 H972 3/09/83 H978 3/09/83 H989 3/09/83 H994 3/09/83 H995 3/09/83 H999 3/09/83 H999 3/09/83 H1016 3/09/83 H1045 3/09/83 H1069 3/09/83 H1070 3/09/83 S3022 3/16/83 S3627 3/22/83 S4084 3/24/83 S4088 3/24/83 S3029 3/16/83 S3036 3/16/83 S3054 3/16/83 S3054 3/16/83 S3054 3/16/83

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Tax deduction for one half of SECA liability	124	<u>FSS(1)</u> 17, 110, 115, 128, 130, 186, 187, 438-442, 449, 461, 470 <u>FSS(2)</u> 522, 560- 562, 570, 714, 727, 853, 862, 865, 871, 928-929, 943, 1002-1003 <u>RSR</u> 13, 85, 87, 126, 161, 162, 164	<u>NCS(1)</u> 3, 5, 32, 82-84, 126 <u>NCS(2)</u> 9, 141, 150, 160- 163, 165- 166, 171- 172, 181- 182, 225, 252, 308- 309, 643- 644 <u>NCS(3)</u> 136, 148, 288, 292, 427-431, 549, 589- 590, 737, 740-741, 749, 864	House 98-25(Pt.1) Senate 98-23	Conf. 98-47 126	
Tax deduction - modify deductability of interest on consumer credit to finance social security		<u>FSS(1)</u> 196	<u>NCS(2)</u> 38, 40, 81, 92-93, 97			

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Tax deductions - to offset social security payroll tax contributions		<u>FSS(1)</u> 438-442, 449	<u>NCS(2)</u> 501	98-25(Pt.1) 98-23		Conable - tax deduction for half of the self- employment FICA tax liability H1780 3/24/83 Dole S4084 3/24/83
--eliminate deductions for employer's portion of the payroll tax		<u>FSS(2)</u> 786, 795, 916, 919	<u>NCS(3)</u> 811, 817- 818			
		<u>IAS</u> 94-95, 122, 126-127	<u>SSO(1)</u> 354, 409, 514-515			
		<u>SFI</u> 195, 199, 499, 501, 511, 922, 943	<u>NCS(3)</u> 811, 817-818			
Tax exclusion - disability income - repeal	122 (26 U.S.C. 37(c)(2) (B))			30, 166	127	
Tax exclusion for social security benefits		<u>SFI</u> 512, 527				

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Tax exemption for persons 65 and over so income and social security taxes do not penalize them for working		FSS(2) <u>751</u> SFI 279, 834, 837, 865, 870, 872-873	NCS(2) <u>150</u> SSO(1) <u>198, 203</u>				
Taxable payroll Social Security benefit as a proportion of See: Social Security cost as and percentage of taxable payroll							
Taxation of benefits	121	FSS(1) 35, 40, 60, 62-63, 75, 76, 78, 83, 105-106, 110, 111, 115, 127, 135, 171-174, 183, 184, 186- 189, 195, 211, 213, 222, 232, 244, 246, 251, 255, 349, 373, 375-376, 391,	NCS(1) 4, 5, 22- 23, 28, 32, 63, 66, 69, 85-87, 89- 90, 102, 119, 121, 126-127, 144, 146, 151, 173- 174, 176, 201-202 NCS(2) 3, 5-6, 10-	4-5, 23- 28, 47- 51, 161, 165, 166, 170, 172, 173-174, 363 2, 3, 8, 25-30, 69 70, 72	122-123	Albosta Senate Finance Committee financing options Dannemeyer Morrison of CONN-remove \$35,700 cap Pepper Rostenkowski Pickle	H4613 7/21/81 S11375 10/14/81 H949 3/09/83 H953 3/09/83 H954 3/09/83 H1063 3/09/83 H1066 3/09/83 H1069 3/09/83 H956 3/09/83 H1780 3/24/83 H961 3/09/83 H1782 3/24/83

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						Coleman of MO	H992	3/09/83
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Taxation of benefits (cont.)						<p>Boren amdt. to eliminate the marriage penalty by setting the thresholds at \$20,000 for individuals and \$36,000 for married couples S3697-rejected, 34-62 3/23/83</p> <p>Boren S3697-3698 3/23/83</p> <p>Dole S3697-3698 3/23/83</p> <p>Bradley S3756 3/23/83</p> <p>Hollings S3759 3/23/83</p> <p>S4092 3/24/83</p> <p>S3760 3/23/83</p> <p>Hatch</p> <p>Boschwitz - \$20,000 for individuals, \$25,000 for couples S3762 3/23/83</p> <p>Percy S3765 3/23/83</p> <p>Robt. C. Byrd S3768 3/23/83</p> <p>Glenn S3771 3/23/83</p> <p>Thurmond S3772 3/23/83</p> <p>Chafee S3775 3/23/83</p> <p>Daub H1783 3/24/83</p> <p>D'Amato S4095-4096 3/24/83</p> <p>Leahy S4097 3/24/83</p> <p>Lautenberg S4102 3/24/83</p>		

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Taxation of benefits - eliminate employee social security contributions from taxable income			<u>NCS(3)</u> 587, 588				
Taxation of benefits - eliminate \$20,000 and \$25,000 limits			<u>NCS(3)</u> 587				
Taxation of benefits - exempt individuals who are within five years of retirement			<u>NCS(3)</u> 195				

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Taxation of benefits-- inclusion of worker's compensation payments in benefits subject to taxation	121(26 U.S.C. 86(d) (3))			26, 47, 48	123		
Taxation of benefits-- index threshold of exempt income		FSS(2) 592, 593, 720, 735					
Taxation of benefits-- index to average annual wage changes or other appropriate index		FSS(1) 482	NCS(1) 173-174 NCS(3) 187, 194- 195				
Taxation of benefits-- lump sum payments	121(26 U.S.C. 86(e))			26, 48 27-28	122-123		
Taxation of benefits-- marriage penalty		FSS(1) 251 FSS(2) 850, 945, 1003	NCS(2) 13, 608, 645 NCS(3) 187, 194			Boren	S3697- 3698 3/23/83
Taxation of benefits-- marriage penalty - explanation		RSR 247, 248, 251-252					

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Taxation of benefits - nonresident aliens, treatment of --return information - disclosure of information concerning non-resident aliens	121 (26 U.S.C. 6050F (c))			24, 27, 47, 50	28	123			
	121 (26 U.S.C. 6050F(g) (3)(A) (6))			27, 50	28	123			
Taxation of benefits - "notch" effect - problem		FSS(1) 105, 188, 231, 246-247, 251-252, 353, 391, 421, 441, 469, 471	NCS(1) 5, 23, 63, 103, 127, 159				Smith of FLA	H989	3/09/83
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Taxation of benefits - reason for choosing the figure \$20,000		<u>RSR</u> 62-63				
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Taxation of benefits - retired military personnel			NCS(3) <u>727</u>				
Taxation of benefits - static amount instead of indexing amount of income		RSR 101-102					
Taxation of benefits - tax all retirement income		FSS(1) 488, 489, 491	SSO(1) <u>409</u>				
Taxation of benefits - tax all social security benefits			NCS(1) <u>63</u>				
Taxation of benefits - tax benefits in excess of contributions		FSS(1) 44, 469, 471, 475, 477, 481, 485, 488 FSS(2) <u>974</u>	NCS(1) 85-87, 89- 90, 173 NCS(3) <u>466</u> SSO(1) <u>86, 162-163</u>			Reader's Digest article H1009 3/09/83	
Taxation of benefits - tax exempt income						Shumway Long Long amdt. to disregard tax-	H999 3/09/83 S3056 3/16/83

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Taxation of benefits - tax exempt income (cont.)						exempt interest (municipal bonds) in computation of income for purposes of taxation of social security benefits, rejected Long D'Amato Chafee Melcher Dole Heinz Constitutionally of including tax exempt income in the social secur- ity base-memorandum of law Conable	S3730- 3739 S3731- 3738 S3732- 3733 S3735- 3736 S3774 S4095- 4096 S3733- 3736 S3775 S3733 S3736- 3737 S3775 S4084 S3737- 3738	3/23/83 3/23/83 3/23/83 3/24/83 3/23/83 3/23/83 3/23/83 3/23/83 3/24/83 3/23/83

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--interest on tax exempt bonds		RSR 59			123	
Taxation of benefits - transfer amounts to trust funds	121 (26 U.S.C. 6050F (e))	FSS(1) 115	NCS(1) 127	27-28, 50-51 8, 28-29	122	
Taxation of benefits - treat social security benefits as a pension or annuity for pur- pose of earned income tax credit, retirement savings contributions, deductions for two earner married couples and foreign earned income exclusion	121 (26 U.S.C. 86(f))			49 28		
Taxation of benefits - treatment of social security benefits as U.S. - source income	121 (26 U.S.C. 6050F (d))	FSS(1) 106		24, 27, 50 28		
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Taxes, corporate income - surtax or tax on, to finance social security		FSS(2) 1020	NCS(3) 469-470, 478-479			
Taxes - employer paid health insurance premiums, modify treatment of		FSS(1) 196	NCS(2) 38, 40, 81, 97			
Taxes, estate - use to fund social security		FSS(2) 793-794				
Taxes, excess tax on income profit greater than 15%		FSS(2) 1020				
Taxes - excise tax on cigarettes, maintain to finance social security		FSS(1) 196	NCS(2) 38, 40, 81, 93, 97 NCS(3) 473-474			

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Taxes - excise tax on liquor, beer and wine - double or increase to finance social security		FSS(1) 196	NCS(2) 38, 40, 81, 92, 93, 97 NCS(3) 473-474				
Taxes - flat tax			NCS(3) 477-478				
Taxes - import tax to finance social security		FSS(2) 1020					
Taxes - lawyers' income tax to finance social security			NCS(3) 476				
Taxes - medical income tax on hospitals and physicians' income to finance social security			NCS(3) 475-476				
Taxes - national sales tax		FSS(2) 1020 SFI 210					

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Taxes - on corporate gross sales to finance social security		<u>FSS(2)</u> 1019					
Taxes - on oil or utility companies to finance social security			<u>NCS(3)</u> 475				
Taxes, payroll - abolish		<u>SFI</u> 992					
Taxes, payroll - accelerate increase scheduled for 1985 to 1983 or 1982		<u>SFI</u> 195, 199, 213, 406, 426, 751, 762, 921, 923	<u>SSO(2)</u> 209, 249				
Taxes, payroll - accelerate increase scheduled for 1985 to 1984 and part of the increase scheduled for 1990 to 1988	123	<u>FSS(1)</u> 60, 65, 68, 74, 76, 110, 135-136, 172, 184, 223, 225, 236, 238-239, 251, 373-375, 381, 421, 461, 467, 472, 474-475, 476, 481	<u>NCS(1)</u> 3, 5, 7, 20, 28, 32, 68, 119, 121, 122, 157 <u>NCS(2)</u> 7-9, 75, 77, 82, 83, 122, 129-130,	5, 31, 53- 54, 161, 162, 165, 170, 172, 174, 360 2, 3, 8, 30, 69, 70, 73, 78	123-124	Rostenkowski Pickle Shannon Rinaldo Levitas McCollum Fields Matsui Fowler Gunderson	H956 H1781 H961 H1064 H962 H974 H975 H983 H985 H986 H994 H995 3/09/83 3/24/83 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83

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Taxes, payroll - accelerate increase... (cont.)		FSS(2) 522, 558, 570-571, 593, 614, 640, 643, 656-661, 663, 712, 714-715, 719, 727, 731, 749, 771, 777, 778, 787, 789, 829, 853, 858, 871-872, 922, 926, 928-929, 951, 957, 963, 1001-1002, 1030, 1034 RSR 13, 19, 22, 23, 122-124, 158, 162, 164, 180-181 SRP(2) 51	133, 135, 140, 166, 221, 229, 307-308, 317, 325- 327, 338, 340, 344, 406, 557, 608, 619- 620, 631, 639-641 NCS(3) 75-76, 80- 81, 136, 193, 284- 287, 291, 417, 632, 638, 658, 708-709, 748, 756, 797, 816, 846-847 51			Conable Albosta Shumway Wirth Bilirakis Biaggi Ritter Rahall Synar Ratchford Porter Pepper Dole Cost estimate Comparison with present law Heinz Helms Chafee Armstrong amdt. to not increase the payroll tax rejected, 27-67 Armstrong Moynihan Symms Dole	H996 3/09/83 H997 3/09/83 H998 3/09/83 H999 3/09/83 H1002 3/09/83 H1003 3/09/83 H1011 3/09/83 H1012 3/09/83 H1016 3/09/83 H1018 3/09/83 H1051 3/09/83 H1053 3/09/83 H1069 3/09/83 S3022 3/16/83 S3477 3/21/83 S4084 3/24/83 S4087 3/24/83 S4095 3/24/83 S3029 3/16/83 S3036 3/16/83 S3048 3/16/83 S3261 3/17/83 S3759 3/23/83 S3492 3/21/83 S3608- 3610 3/22/83 S3608 3/22/83 S3609 3/22/83 S3609- 3610 3/22/83

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Taxes, payroll - accelerate increase scheduled for 1985 to 1984 and part of.... (cont.)						Jepsen Mattingly Baucus Melcher Bradley Hatch Percy Robt. C. Byrd Summary of provisions Thurmond Daub Leahy Lautenberg	S3609 3/22/83 S3609- 3610 3/22/83 S3690 3/22/83 S3739 3/23/83 S3756 3/23/83 S3760 3/23/83 S3765 3/23/83 S3768 3/23/83 S3770 3/23/83 S3773 3/23/83 H1783 3/24/83 S4097 3/24/83 S4102 3/24/83
---effect on home costs		FSS(1) 420	NCS(2) 307-308				
Taxes, payroll - accelerate increase scheduled for 1988		FSS(1) 119					
Taxes, payroll - accelerate increase scheduled for 1990 to 1982			SSO(1) 280				
Taxes, payroll - adjustment of rate to 6.44% for employees and employers and 12.88% for self-empl- oyed in the year 2015				67, 68, 162, 175			

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Taxes, payroll - baby sitters, services performed by - social security taxes paid on		STI 161-162					
Taxes, payroll - burden of/growth of		FSS(1) 125 FSS(2) 773	NCS(2) 85, 87-88, 97, 140, 157-158 NCS(3) 345, 544, 661-662 SSO(2) 49-52, 61- 63, 98-100			Pepper	H1071 3/09/83
Taxes, payroll - delay increase scheduled in 1985		TAP(1) 544					
Taxes, payroll - deposit date relief for small businesses				159-160		Armstrong Armstrong amdt. to permit employers with less than \$5000 in monthly with- holding to deposit taxes 15 days after the	S3054 3/16/83

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Taxes, payroll - deposit date relief... (cont.)				98-25(Pt.1) 98-23		calendar month in which the taxes are collected, adopted 96-4 not voting Armstrong S3229- 3231 3/17/83 S3229- 3230 3/17/83 S4091 3/24/83 S3229- 3230 3/17/83 Symms S3230 3/17/83 Dole S3230 3/17/83 Levin S3230 3/17/83	
Taxes, payroll - deposits, interest on late State deposits		STI 60-61, 77-78, 162, 167		69, 85	138		
Taxes, payroll - economic impact of increases in social security tax rates			SSO(2) 206-223				
Taxes, payroll - effect on inflation		SFI 116, 119, 535-536					
Taxes, payroll - employer does not pay an amount equal to that of employees		FSS(2) 786, 795	NCS(3) 810-818				

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Taxes, payroll - exemption for low income persons		FSS(2) 554, 557 SFI 910, 912, 934	NCS(2) 131 SSO(1) 444	98-25(Pt.1) 98-23	98-47	
Taxes, payroll - foreign experience		FSS(1) 499	SRP(2) 53			
Taxes, payroll - freeze at January 1980 level		FSS(2) 875				
Taxes, payroll - freeze at present rate			NCS(3) 531			
Taxes, payroll - Medicare financing by		SFI 57-59	SSO(2) 6-7			

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Taxes, payroll - Medicare reimburse-ment limitations - disregard costs of FICA contributions in determining		FSS(2) 647, 649, 668, 671, 672, 688	NCS(2) 270-271 NCS(3) 325	98-25(Pt.1) 98-23	98-47			
Taxes - payroll more popular than income tax and therefore easier to raise		SFI 154						
Taxes, payroll - overemphasis upon		FSS(1) 46, 132-134, 416, 418, 467, 469 FSS(2) 706, 707-708, 772, 922, 951, 962, 1009	NCS(1) 3, 10 NCS(2) 106, 107, 123, 125, 134, 220, 299, 317, 318, 320 NCS(3) 127, 131, 544, 672- 673			Dannemeyer Frenzel Walker Levitas Roth Chandler Armstrong "An Imperfect Compromise" article Grassley Humphrey Hollings Nickles Domenici	H1949 H1008 H957 H1063 H972 H975 H1007 H1007 S3053 S3055 S3061 S3062 S3576 S3759 S3769 S3769	3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/09/83 3/16/83 3/16/83 3/16/83 3/16/83 3/22/83 3/23/83 3/23/83 3/23/83

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Taxes, payroll - payment of FICA tax by regionalized medical schools for Washington, Alaska, Idaho and Montana - common paymaster doctrine	125				160	Gorton amdt. adopted Gorton Symms Jackson Dole Corton substitute amdt. for amdt. adopted on 3/18/83 adopted Gorton Dicks Gorton - legis- lative history of common pay- master provision	S3340- 3341 S3340 S3340- 3341 S3341 S3341 S4088	3/18/83 3/18/83 3/18/83 3/18/83 3/18/83 3/24/83
Taxes, payroll - percentage of persons who pay more in social security taxes than they do in Federal income taxes		RSR 100	SSO(2) 51					
Taxes, payroll - raise by 0.46% in the year 2010 accompanied by a refundable income tax credit		FSS(1) 94, 97, 117- 118 FSS(2) 848, 1006, 1032	NCS(1) 18, 25-26, 68, 139-140, 142, 147, 172, 196, 197					

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Taxes, payroll - raise by 0.46% in the year 2010... (cont.)		RSR 5, 9, 12, 17, 48, 69-70, 76, 81-82, 135-137, 153, 155, 176, 178, 181, 184, 224	NCS(2) 69, 400, 408, 413, 415, 653 NCS(3) 40, 49-50, 293, 647				
Taxes, payroll - raise by 0.46% in the year 2015 if there is a shortage in the trust funds accompan- ied by a refundable income tax credit			NCS(1) 143 NCS(3) 49-50				
Taxes, payroll - raise combined employer/employee tax rate by 0.24% in the year 2015				6, 67, 68		Taylor Dannemeyer Rostenkowski Shannon Levitas Conable Wirth Pickle Glickman	H947 3/09/83 H949 3/09/83 H956 3/09/83 H963 3/09/83 H975 3/09/83 H997 3/09/83 H1002 3/09/83 H1054 3/09/83 H1063 3/09/83
---accompany by a refundable income tax credit		FSS(1) 174					

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Taxes, payroll - raise combined employer/employee tax rate by 0.53% in the year 2010-Pepper amendment						Taylor H947 3/09/83
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Taxes, payroll - raise combined employer/employee tax rate to 9% in 2010						Senate Finance Committee financing options	S11375	10/14/81
Taxes, payroll - raise employer portion of the tax		FSS(1) 15, 18-19						
Taxes, payroll - raise 1982 payroll tax rate by 0.80%			SSO(1) 292					

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Taxes, payroll - raise payroll tax rate by 0.65%		SFI <u>110</u>	SRP(2) <u>51</u>				
Taxes, payroll - raise payroll tax rate to 6% beginning in 1982 and hold there for the next 25 years		SFI <u>109, 113,</u> 656-657, 680	SRP(2) <u>5</u>				
Taxes payroll - raise payroll tax rate to 7.5% in the year 2005 and hold at that rate for 75 years		SFI <u>937</u>					
Taxes, payroll - raise payroll tax rate to 8.3% of payroll		FSS(2) <u>1020</u>					
Taxes, payroll - raise rather than cutting benefits		FSS(1) <u>349</u>	NCS(2) <u>77, 100-102</u>				
Taxes, payroll - raise rather than raising earnings base		FSS(2) <u>923</u> SFI <u>461</u>	NCS(3) <u>547</u> SSO(2) <u>300</u>				

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Taxes, payroll - reason for compulsory contributions			SSO(1) 434			
Taxes, payroll - reduce		SFI 298-300, 493, 494, 496, 512				
Taxes, payroll - reduce in periods of inflation and high unemployment		SFI 535-536				
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Taxes, payroll - regressive nature of		<u>FSS(1)</u> 481 <u>FSS(2)</u> 727, 728, 859 <u>SFI</u> 58, 298, 328, 513-514, 664, 669, 895	<u>NCS(1)</u> 141 <u>NCS(2)</u> 420, 599 <u>NCS(3)</u> 733 <u>SSO(2)</u> 49, 62, 115			Seiberling Gonzalez Oxley Conable	H998 3/09/83 H1005 3/09/83 H1056 3/09/83 H1076 3/09/83
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Taxes, payroll - self-employment - raise withholding by 2%			NCS(3) <u>535</u>					
Taxes, payroll - set at a rate in the next century that would fully finance the cash benefits program See also: Taxes, payroll - rate required to maintain present level of benefits		SFI <u>652, 657</u>						

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